ASIAN WOMEN BEAUTY RITUAL

KANTAR WORLDPANEL

KANTAR WORLDPANEL

INDONESIA

ANISA 25

Getting Up

- Taking shower every morning using own body wash, shampoo and face cleanser that are widely available at drugstores. Preference of body wash with whitening claims and scrub.

Pre Makeup

- Apply body lotion with high SPF after shower. Due to my oily skin, I choose water based face moisturizer with oil control then add SPF 50 sun screen lotion afterwards

Morning Makeup

- Focus on the eyes and some contouring. I choose mostly smokey natural shades for the eyes and nudes for everything else.
- Prefer using foundation for more coverage and lasting makeup, adding pressed powder afterwards to absorb more oil
- Steps: concealer > foundation > pressed powder > blush > bronzer > eyeshadow (2 colors) > eyeliner> eyebrow > mascara > lip liner > liquid lipstick(lip cream)

Makeup Correction

- I don't do much touch ups, unless during highly active days
- Always have compact powder on my beauty case, blush, mascara and lipstick

Afternoon

- Grab a bottle of cold pressed juice from a well known local organic juice chain

Work Out

- Work-out 3 times/week at gym near the office
- Wipe off makeup using face wipes

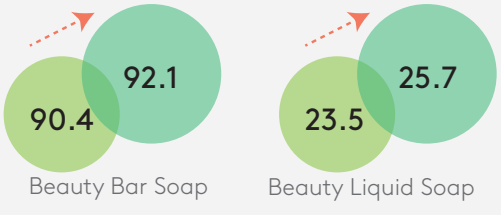
End of Day Ritual

- Applying multiple cleansing steps to get rid of make up completely.
- Pamper my face with traditional or sheet masks 3 times a week

Morning Shower Ritual

Body soap with beauty functional benefits constantly growing by enlarging its buyers base.

*Penetration %
Body Cleanser
Total Indonesia



Beauty Bar Soap

Beauty Liquid Soap

Pre Makeup

Due to the tropical climate, whitening and sun protection is the most popular functional benefit of skin care in Indonesia

*Penetration %
KWP HBL & Facial Care
Total Indonesia

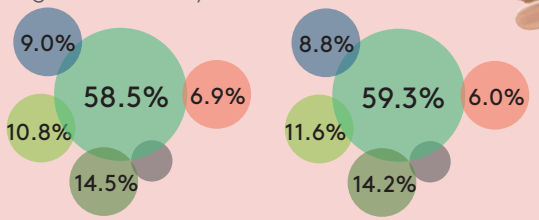
HBL with SPF

Face Moisturizer with SPF

Base Makeup

Two-way cake is highly popular among Indonesian woman as it's easy to apply, provides coverage and mostly comes with SPF.

- Others
- BB
- Loose Powder
- TWC
- Compact
- Foundation



29/01/2017

31/01/2017

*KWP ID total cosmetics /Total Indonesia/P1 2017 vs YA

Lips Makup

Matte lip cream provides lasting color and more coverage. Recent launch by local cosmetic brands offers great quality lip cream in more affordble price.

Lip Cream +IDR 26BIO*

Eye Makeup

Following the striking eyebrow trend, eye brow kit becomes the must have cosmetic item for Indonesian woman right now. Can't leave house with out on-fleek brows!

Eye Brow Cosmetics 140% Penetration Growth VS YA

Makeup Correction

I always bring complete makeup set for a thorough touch up whenever in need, which includes compact powder, stick eye shadow, mascara, eye brow pencil, blush on and several lipsticks.

Afternoon

Organic cold pressed juice offers various health and beauty benefits on-the-go, as it is also a good snack alternative. Re Juve, , the most popular cold pressed juice chain in Indonesia, can be found easily in big cities.

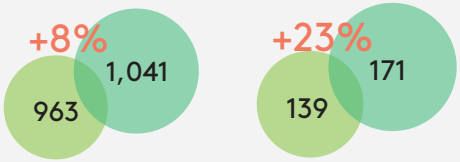
Work Out

Always bring my own body shower, shampoo and face wash in travel size to the gym.Wipe off makeup before starting work-out. Preference to use facial wipes for practical reasons.

End of Day Ritual

Multiple cleansing steps to wipe off makeup:
e ye makeup remover > milk cleanser > toner/ micellar water > facial foam

- 31/01/2016
- 29/01/2017



Cleansing Foam

Milk Cleanser

KANTAR WORLDPANEL

KOREA

ERIKA
25

Getting Up

- Take a shower right out of the bed.
- Use my own body wash and shampoo. Choose whatever I feel like to use on the day.

Pre Makeup

- Special focus on UV protection sunscreen the first step of anti-aging since it protects skin from UV/blue light.

Morning Makeup

- Multi-layer and multi-shade is the key in all base, eye and lip makeup.
- Point makeup color choice upon outfit/ mood of the day.
- Steps: primer> makeup base for tone neutralization > concealer > foundation (2 shades)> eyeshadow (2+shades) > eyeliner > mascara> eyebrow > blush > lip

Makeup Correction

- Makeup correction in the afternoon.
- Use either cushion foundation or concealer for base makeup correction.

Afternoon

- Consciously drink 1.5L of water in the office as a skin care ritual.

Work Out

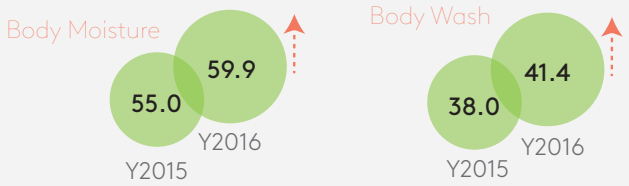
- Work-out 4 times/week
- Preference of convenient beauty products like cleansing bar, sun stick, small-packed skin care.

End of Day Ritual

- Thoroughly remove makeup with a few types of cleansers.
- Use sheet mask with different functions according to daily skin condition.

Morning Shower Ritual

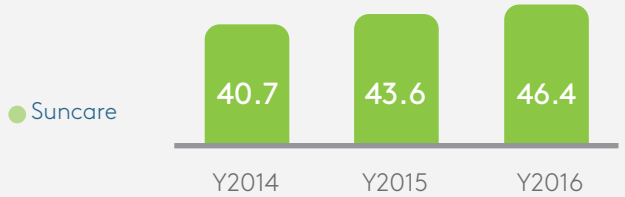
- Use multiple products with different scents and function
- Family members use different products of their own preference, resulting in individual usage growth.



*Value %/5,500 households

Pre Makeup

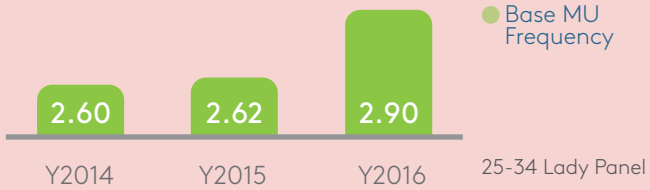
Raising concern about UV and micro-dust triggered importance of sun care, resulting in big growth in the category.



*Penetration % | KWP Beauty Panel
Age 25-34 | Korea

Base Makeup

Base makeup frequency growth indicates use of multiple shades and types.



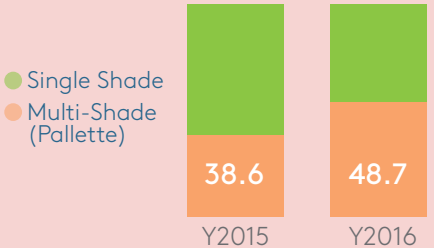
25-34 Lady Panel

Lips Makeup

Use more and more lip products in different types and shades to make perfect gradation.

Eye Makeup

Eye-contouring makeup trend triggered multi-shade usage, resulting in a big growth in eyeshadow pallete.



Makeup Correction

Use convenient cushion foundation for makeup correction.
Preference of high-end global brands
Also use concealer to cover dark circles and to highlight T-zone.

Afternoon

Prefer water bottle to water fountain for its convenience.
Order water bottles online and stack them in the office.

Work Out

On-the-go products (e.g sun stick and cleansing bar) are purchased, stretching the convenience out of home.

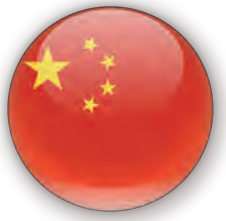
Category	Y16 Pen%	Gap%p
Sun Stick	3.9	+2.6
Concealer	11.6	+1.1
Cushion	35.9	+1.0

End of Day Ritual

Cleansing: Multiple cleansers to throughly remove heavy makeup
Skin Care: Young buyers use facial sheet mask on daily basis.

KANTAR WORLDPANEL

CHINA



YVONNE 26

Getting Up

- Wash my face and brush the teeth.
- Consider to purchase cleansing device and electronic teeth brush.

Morning Makeup

- Simple routine/light makeup when go to work, BB/CC cushion + eye brow + lip
- Sophisticated makeup for some special occasions or going out in weekend, use different color tone based on my mood/outfit of the day.

Pre Makeup

- Basic skin care steps – cleanser> toner > moisturizer/lotion/cream. Start to use advanced format eg. essence recently.
- Use UV protection as the last step of skin care, especially in summer.

Afternoon

- Drink water/fruit juice and eat fruits to keep myself healthy and fit

Work Out

- Work-out 4 times/week.
- Have sun screen/cushion/lip stick/ facial tissue in my bag for makeup correction.

Nighttime

- Take a shower at night.
- Generally share shampoo and body wash with my family. But use my own leave-on hair oil to make my hair smooth and shine.

End of Day Ritual

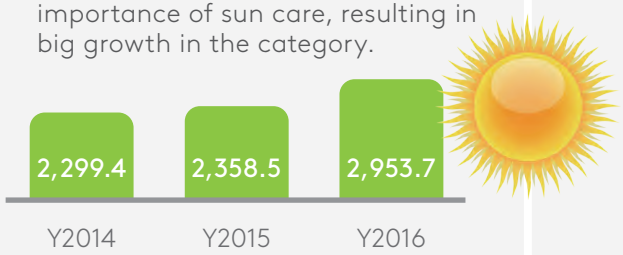
- Remove makeup or sunscreen if necessary with a few types of cleansers.
- Use sheet mask 2-3 times a week, as a way to relax my self.

Morning Skin Care

Essence is the next trend setter in China
Welcomed by young women(20-34).

Penetration% of Essence/Serum/HHP, TOTAL CHINA

Raising concern about UV triggered importance of sun care, resulting in big growth in the category.



Value（Million RMB）of Facial Sun/ HHP, TOTAL CHINA

Purchase skin care products across price tiers
Average No. of price tier purchased:
1.77(2014)> 1.87(2016

HHP,Total China

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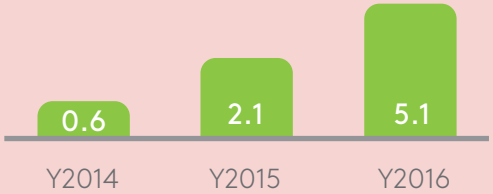
Cushion

BB/CC cream is the dominate base makeup as well as entry product for makeup cushion enjoys aggressive growth due to its convenience.



Cushion Pene%

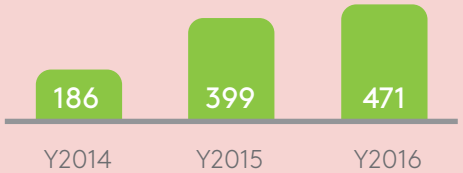
Lips Makeup

Use more and more lip products in different types and shades to make perfect gradation.

MORE COLORS
NEW TYPE
(LIPTINT)

Eye Makeup

Eye brow trends is greatly influenced by K-beauty and popular stars.



Value (Million RMB) of Eye Brow

Afternoon

"Drinking 8 glasses of water keeps you healthy" is quite popular in China.
Have yogurt/fruit juice or fresh fruit in the afternoon to keep myself healthy and fit.

Work Out

Apply sun screen before I go out for lunch outside the office in summer.
Have sun screen/cushion/lip stick /facial tissue in my bag for makeup correction when I go out.

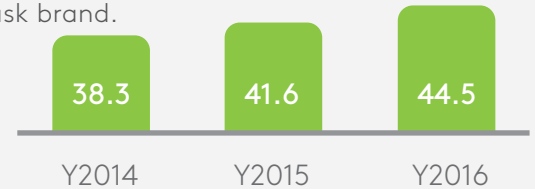
Night

Use my hair oil before or after hair wash. Usually buy those advanced format through online shopping because of various offering and price discount.

Average vol per buyer
-Leave-on conditioner

End of Day Ritual

Sheet mask is the No.4 regime after basic 3 steps in China. Korean sheet mask is very popular in China and Mediheal (a Korean brand) is the No. 1 sheet mask brand.



KANTAR WORLDPANEL

MALAYSIA

NATALIE
35

Getting Up
- Spends on body wash and body moisturizers remain flat as economy slows down in the country, shoppers are probably stretching usage.

Pre Makeup
- Spends on facial moisturizer remains flat as economy slows down in the country, shoppers are probably stretching usage.

Morning Makeup
- Foundation as the first barrier against the hot sun.
- Shoppers shop more often for lipsticks. With the growing 'thicker' eyebrow trend in Korea, shoppers buy eyebrow liners more often.

Makeup Correction
- Usually no makeup correction, only blot sebum using high quality tissue.

Afternoon
- Drink a lot of water throughout the day (at least 2L).

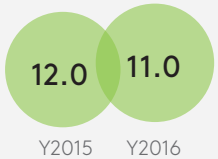
Work Out
- Roll-on deodorant is preferred because it is smaller in size to carry around.

End of Day Ritual
- Thoroughly remove makeup with a makeup remover and cleansing gel.
- Use sheet mask or soak-in mask with different functions according to daily skin condition.

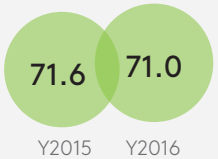
Morning Shower Ritual

- Use multiple products with different scents and function
- Family members use different products of their own preference, resulting in individual usage growth

Body Moisture



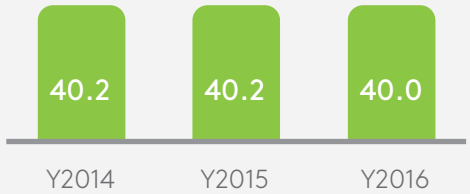
Body Wash



HHs Spend

*Value% 2,500 households Total Pen. Malaysia

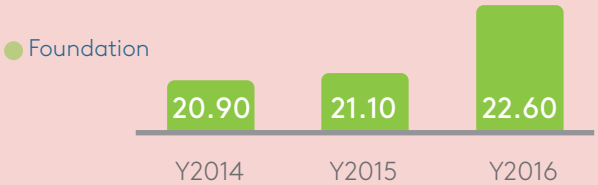
Spends on facial moisturizer remains flat as economy slows down in the country, shoppers are probably stretching usage.



Penetration% 2,500 households Total Pen. Malaysia

Base Makeup

Foundation as the first barrier against the hot sun.



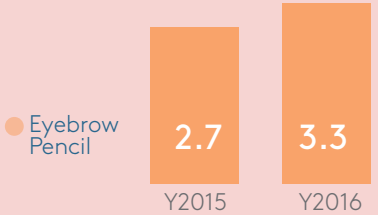
*Value% 2,500 households Total Pen. Malaysia

Lips Makeup

Shoppers shop more often for lipsticks.

Eye Makeup

With the growing 'thicker' eyebrow trend in Korea, shoppers buy eyebrow liners more often.



*Frequency 2,500 households Total Pen. Malaysia

Makeup Correction

Usually no makeup correction, only blot sebum using high quality tissue.

Afternoon

Drink a lot of water throughout the day (at least 2L).
Use glass bottle instead of plastic bottle because it is environmental friendly.

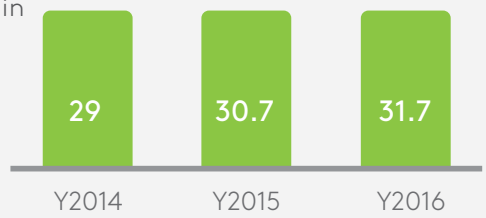
Work Out

Roll-on deodorant is preferred.

Category	Y16 Pen%	Gap%p
Deodorant (Roll on)	68.9	+9.2

End of Day Ritual

- Use makeup remover and cleansing gel.
- Use sheet mask or soak-in mask with different functions.



*Value% 2,500 households Total Pen. Malaysia

KANTAR WORLDPANEL

VIETNAM

TRA 25

Getting Up

- Start the morning with face cleansing using facial cleanser (natural brand).
- Follow with toner to remove residual of oil.

Pre Makeup

- Apply moisturizer.
- Apply sunscreen, which is an essential step to protect skin from sun damage and aging process.

Morning Makeup

- I prefer simple and natural – looking makeup for daily routine.
- Use BB/CC cream (more convenient than powder foundation)
- Apply lip stick as the 2nd step for makeup. eye makeup is not frequently used on daily basis.
- Preference for a simple makeup routine with average makeup products purchase per year is only 2 items.
- Face makeup and lip makeup are top choices and continue to recruit more buyers.

Afternoon

- Drink juice very often to provide the body with vital vitamin and nutrient.
- Drink vitamin everyday and collagen every 2 days.
- Drinking at least 2L of water per day to purify the body.

Work Out

- Practicing yoga or go to gym 3 times a week after work.

End of Day Ritual

- Thoroughly remove makeup with makeup removers.
- Take a shower everyday after work.
- Shampoo every 2 days and apply hair conditioner.
- Apply moisturizer for face and body.
- Use mask 2-3 times per week (prefer Sheet mask for convenience)

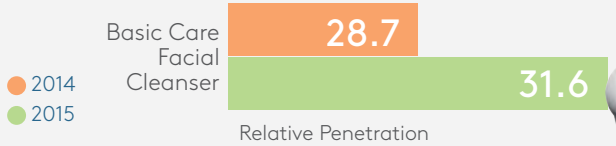
Morning Shower Ritual

"I prefer to choose natural beauty products"

Source: Lifestyle survey 2016 - % Housewives agree

83%

Using Natural Facial Clanser



Pre Makeup

What's the common point?

- Natural ingredients claim, mild cleansing
- Imported (esp. Japan/Korea)
- Higher price, in very big pack size

Top recruiting brands in Basic Care Facial Cleanser

Base Makeup

Along with the arise of convenience trend, BB/CC cream and long lasting lipsticks become more popular.

BB/CC Cream

+18,000
additional buyers
vs YA

Cushion Foundation
Reaches
20.000
buyers after 4 months available

Lips Makeup

Liquid Lipstick
+21,000
additional buyers

Daytime Health Care Food

① Fruit Juice (both fresh juice & branded juice) continue to grow over time.

+8% Drinking occasion growth (MAT16 Q3 vs. YA)

② Refill water into mug from the company's bulk water dispenser, at least 1L over the working time.

③ Inner beauty also matters to many urban women.

58% HWs agree:
"I often take vitamin supplements/ OTC products"

Work Out

Majority of Housewives in urban and rural said that they exercise regularly for better health.

79	78
HANOI	HCMC
URBAN	

"I exercise regularly for better health"

% Housewives Agree
alaysia

Evening Facial Care

- Makeup remover is becoming more and more popular and amongst top beauty category recruiter.
- Mask category is gaining fast, esp. sheet mask due to convenience.

Buyer Recruitment

Total Cosmetic Remover	+32.5K
Micellar Water Make-up Remover	+20K

Incremental buyers

Source: Household Purchase Panel – Urban 4 key cities – Categories excl. Gift – MAT Q2'16 vs YA

Hair & Body

The fact of using more natural or salon care hair products is prevailing.

Natural		Salon Care	
Thai Duong	+2.7pts pen	Tresemme	+2.3pts pen
Thorakao		L'oreal	
Oraanix/OGX		Chihtsai	
Purite		Kerasys	
Kracie Ichikami			
Organic			
Herbal Essences			

KANTAR WORLDPANEL

PHILIPPINE

GLADYS 31

Getting Up

- Take a shower with very particular bath essentials.
  - Shampoo used everyday; conditioner every weekend only
  - Germicidal bar soap for cleansing, whitening soap as add-on
- Wash face with anti-bacterial facial moisturizer.

Morning Makeup

- Makeup done only during special occasions (i.e. client meetings or presentations) and normally consists of lipstick, powder/BB cream and eye brows.

Afternoon

- Freshens up with powder in the afternoon.
- Brush teeth.
- Consciously drinks enough of water.

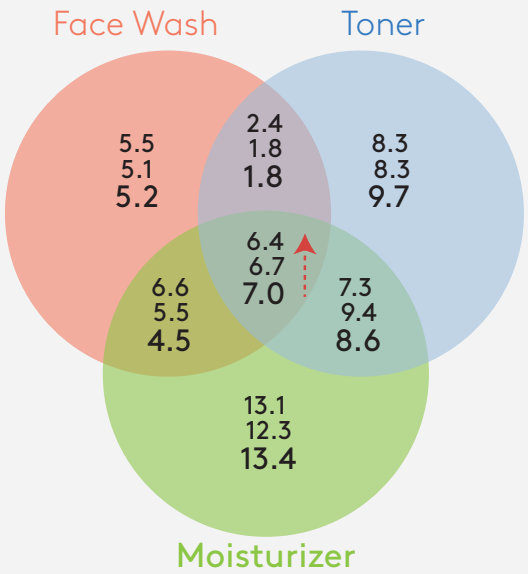
End of Day Ritual

- Take a shower.
- Wash face with anti-bacterial face care.

Skin Care

There is a trend in sophistication among consumers in their skin care regimen as we see growth in multiple format buyers.

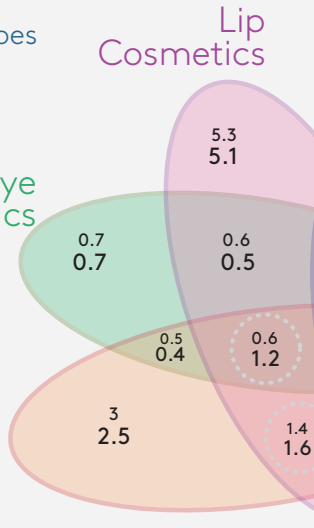
● Interaction of Face Care Formats (Penetration)



FY2014
FY2015
FY2016

● Interaction of Cosmetics Types (Penetration)

FY 2016 vs. YA



Ave. no. of formats bought in a year: 1.4
no change vs. YA

FY 2015
FY 2016

Hair & Body Care

While bath essentials still dominate the growing categories, there is a trend in the smaller but emerging formats, suggesting increasing complexity in the beauty regimen of Filipinos

2016 Value growth vs. YA

	2016 % Spend	Spend % chg
Hair Treatment	0.6	6
Hair Colorant	0.6	22
Liquid Soap	5.7	34

Fragrance Care

Climate is very humid which influences much of the country's beauty regimen choices.

	2016 % Spend	Spend % chg
Deodorant & Fragrance	100	-5
Deodorant	58.5	-1
Cologne/Perfume	41.5	-11

Deodorants and fragrances are finding an unlikely competition in fabric conditioner who has been aggressive with perfumed variant launches whose scent is said to last longer than ordinary perfumes at a much cheaper cost.

Fabric Conditionaer growing by +16%

KANTAR WORLDPANEL

TAIWAN

TIFFANY 28

Getting Up

- Drink a glass of warm water right out of the bed.
- Use only water to clean my face in the morning.

Pre Makeup

- Focus on hydration and UV.
- Sunscreen is to prevent the aging spots from the sun.
- Hydrating is fundamental before any makeup on.

Morning Makeup

- Different kind of contact lenses to match the makeup looks.
- Cushion cake foundation continue to attract buyers because of its convenience and luminous makeup look.
- Different formats of lip makeup with variation of color is the trend.

Noon Time

- After finishing lunch, to browse online searching something to buy is also a break for work.

Afternoon

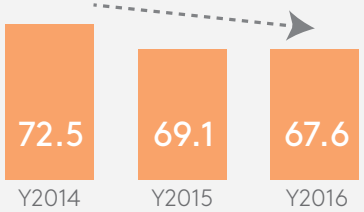
- Drink bubble tea or other ready-to-drink beverages at least once per week to release the pressure from work.

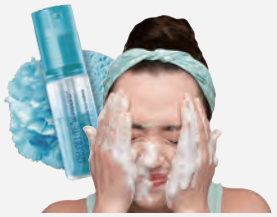
End of Day Ritual

- Using soap as it seems to be more natural than shower gel.
- Cleansing water is getting popular because it is convenient to young consumers. Also, eyelash extensions is a hit in Taiwan recently, and some dermatologists say it is better for skin.
- Regimen:toner>essence>eye cream>lotion/cream

Morning Ritual

- The penetration% of total facial cleansers dropped gradually.
- Not using any cleansing product in the morning becomes a new trend and affected the market.



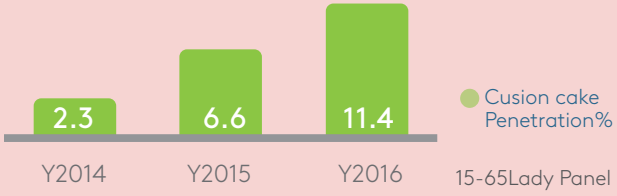


Pre Makeup

- People believe sun care products prevent you from getting tanned.
- More outdoor activities like picnic and running marathon also help suncare products to grow.

Base Makeup

- Cushion cake did well on recruitment among all age groups.
- Mass and counter brands kept launching new products.



Lips Makeup

Different formats of lip makeup products including liquid, lipstick, lip tint, etc. with bold colors are big hits.

Eye Makeup

- The contact lenses market in Taiwan is about 330M pieces in 2016.
- Color lens is the segment with significant growth.

(Source: GFK)

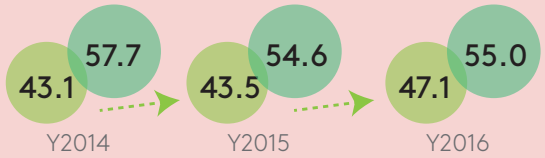
Noon Time

Online stores are attracting more buyers as well as buyers are spending more when shopped online.

* Online Store Channel Value Weight in Total Cosmetics/15-65 Lady Panel

Afternoon

Take-away ready-to-drink beverages are popular in Taiwan, mainly by bubble tea and CVS take-away coffee.

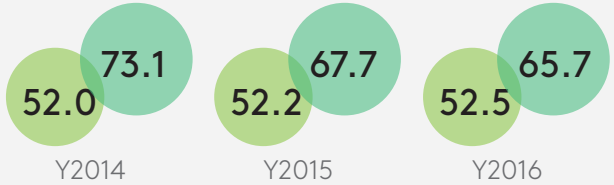


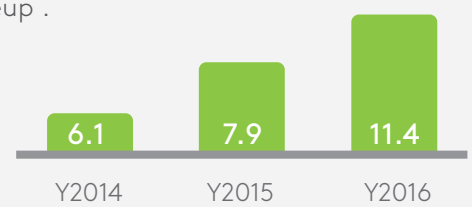
RTD Coffee On-the-go
RTD Tea On-the-go

* Penetration%/15-65 Individual Panel

End of Day Ritual

- Suitable for ladies who have eyelash extensions
- Easy to remove light makeup .





* Penetration%/15-65 Lady Panel/Cleansing water

KANTAR WORLDPANEL

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Getting Up

- Fresh start of the day with a morning shower and wash my face with facial foam cleanser – I prefer to use milder products.

Pre Makeup

- Apply facial moisturizers (using more than one type, esp the new hybrid format serum+ cream) followed by sun block.

Morning Makeup

- Begin with skin-tone correction followed by eye and brow makeup. Then, I contour my face and apply lip products before finishing off the look with mineral spray for natural dewy-looking skin!

Makeup Correction Touch Up... or Top Up?

- To make sure that my makeup stays flawless throughout the day, I usually apply pressed powder and lipstick after lunch.

Afternoon

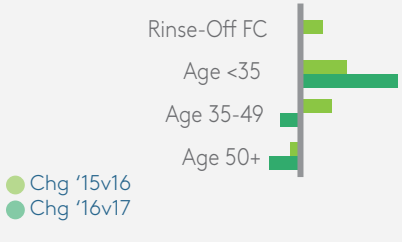
- Snack time at work.

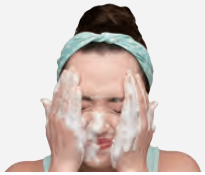
End of Day Ritual

- I make sure my skin is clean and ready to absorb all the good facial products before I go to bed.

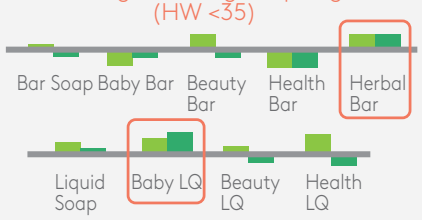
Waking Up...

Sales Changes in ROFC





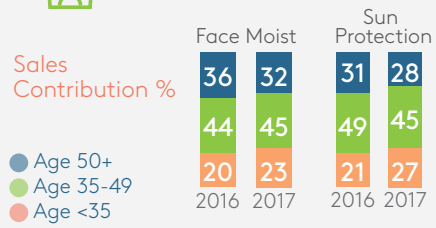
Sales Changes among Soap Segments (HW <35)



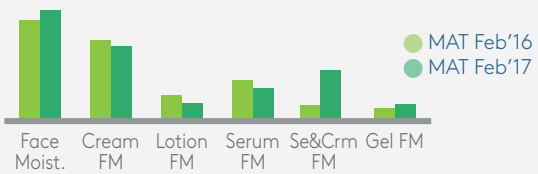
Pre Makeup

Apply Facial Moisturizers followed by sun block.

Sales Contribution %



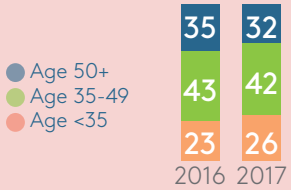
Penetration% of FM Format of HW<35



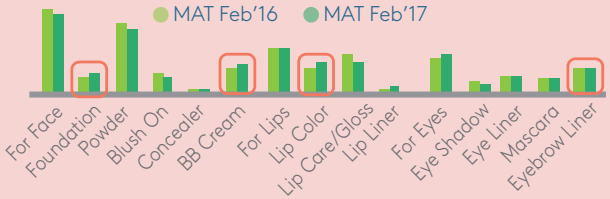
Makeup

Skin tone correction followed by eye and brow makeup. Then, I contour my face and apply lip products.

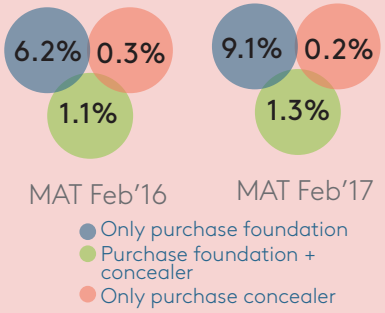
Makeup Sales Contribution%



Makeup Type Penetration % - Age <35



HW Age <35 Skin Corrector Buyer Behavior (Penetration%)



1
1. Foundation
2. Concealer
3. Loose Powder

2
1. Eye Primer
2. Eye Shadow
3. Eyeliner
4. Mascara
5. Brow Pencil
6. Brow Mascara

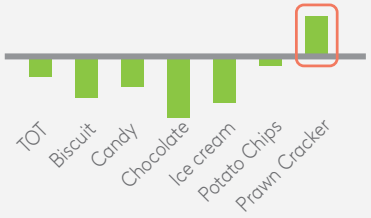
3
1. Highlight & Bronzer
2. Blush-On

4
1. Lip Balm
2. Lip Stick

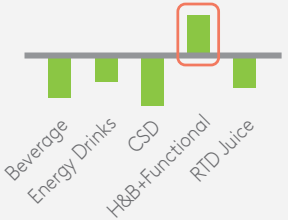
5
1. Mineral Spray

Snack Time @ Work

Snacks Sales Change % of HW Age <35 (OOH)

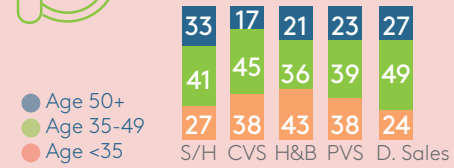


Beverage Sales Change % of HW Age <35 (OOH)

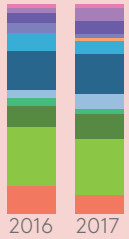


Makeup Correction

MAT Feb'17



Makeup Channel Sales Contribution% By HW Age



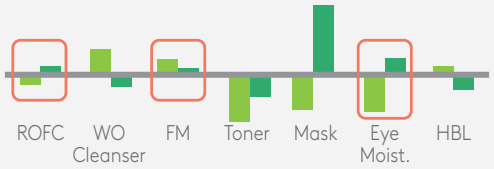
Makeup Spend Contribution % in H&B of HW<35

- Foundation
- Powder
- Blush On
- Concealer
- BB Cream
- Lip Color
- Lip Care
- Lip Liner
- Eye Shadow
- Eye Liner
- Eyebrow Liner
- For Nails

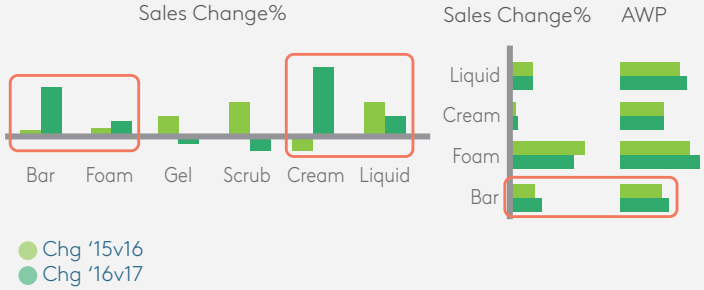
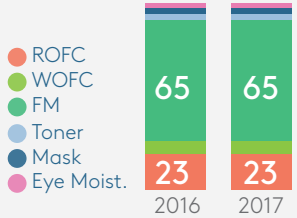
End of Day Ritual

Clean	Moisturize
1. Oil-base makeup remover 2. Water-base makeup 3. Cream facial cleanser 4. Scrub (1x week)	1. Face mask (1/week) 2. Toner 3. Night Cream 4. Cram/Serum Lotion 5. Lip Balm 6. Body Lotion

Skin Care Sales Change % of HW Age <35



ROFC Format Performance Among HW<35 Buyers



Facial Care Spend Contribution% of HW Age <35